2023-2024 Conflicting Student Information

Instructions

During the processing of your 2023-2024 financial aid application, a potential conflict was detected involving your IRS income and tax information transferred from the IRS Data Retrieval Tool (IRS DRT). As a result, the Financial Aid Office must confirm the validity of one or more FAFSA responses.

To complete this worksheet:

- List the applicable amounts received for each income source listed or enter NA if the item does not apply to you.
- Attach the supporting documentation requested.

## Section 1: Income and Wages Earned

   - $ ____________
   - Attach your signed 2021 Federal Tax Return (1040) and applicable schedules.

   - $ ____________
   - Attach copies of all 2021 W2 statements.

## Section 2: Additional Financial Information

1. Education Credits.
   - $ ____________
   - Attach your signed 2021 Federal Tax Return (1040) and applicable schedules.

   - Name(s) of child(ren): ____________________________.
   - $ ____________

3. Taxable earnings from need-based employment programs such as Federal Work-Study and need-based employment portions of fellowships and assistantships.
   - $ ____________
   - Attach your 2021 W2 statements.

4. Taxable college grant and scholarship aid reported to the IRS as income:
   - AmeriCorps benefits, grants and scholarship portions of graduate fellowships and assistantships.
   - $ ____________
   - Attach your signed 2021 Federal Tax Return (1040) and applicable schedules.

5. Taxable combat pay or special combat pay (Exclude untaxed combat pay)
   - $ ____________
   - Attach a signed statement or alternate document showing taxable income earned.

6. Earnings from work under a cooperative education program offered by a college
   - $ ____________
   - Attach a signed statement or alternate document showing taxable income earned.

First Name: _____________________ Last Name: _____________________ Person Number: _____________________
UB Person Number___________________

### Section 3: Untaxed Income

1. Payments to tax-deferred pension and retirement savings plans.  
   - Attach your 2021 W2 statements.  
   
   $ _____________

2. IRA deductions and payments to self-employed, Keogh and other qualified plans.  
   
   $ _____________

3. Child support received for any of your children. Exclude foster care or adoption payments.  
   
   $ _____________

4. Tax exempt interest income.  
   
   $ _____________

5. Untaxed portions of IRA distributions/pensions. Exclude Rollovers.  
   
   $ _____________

6. Housing, food and other living allowances paid to members of the military, clergy and others. Exclude value of on-base military housing.  
   
   $ _____________

7. Veterans’ non-education benefits such as disability, death pension, dependency & indemnity comp or VA educational work-study allowances.  
   
   $ _____________

8. Other untaxed income such as worker’s comp or disability benefits.  
   - Attach a statement from the agency supporting amount received.  
   
   $ _____________

9. Money received, or paid on your behalf (e.g. bills), not reported in any other line on this form. List Source(s): ____________________________.
   - Attach a statement from the source listed supporting amount received.  
   
   $ _____________

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**Certification and Signature – Please handwrite your signature. Typed signatures cannot be accepted.**

I certify that all information provided in this document is true, complete and accurate to the best of my knowledge. I further understand that any false statement or misrepresentation will be cause for denial, reduction, withdrawal, and/or repayment of financial aid. Also, purposely giving false or misleading information on this worksheet may lead to fines, jail sentences, or both. I authorize the University at Buffalo to make any change(s) necessary as a result of the updated information that I have provided.

Student Signature: ___________________________________________  Date_____________________________

(Hand signature, typed signatures not accepted)